

M4

GREATER RALEIGH REAL ESTATE MARKET REPORT JULY 2025 EDITION



WAKE



RALEIGH



DURHAM



ORANGE



JOHNSTON



HARNETT



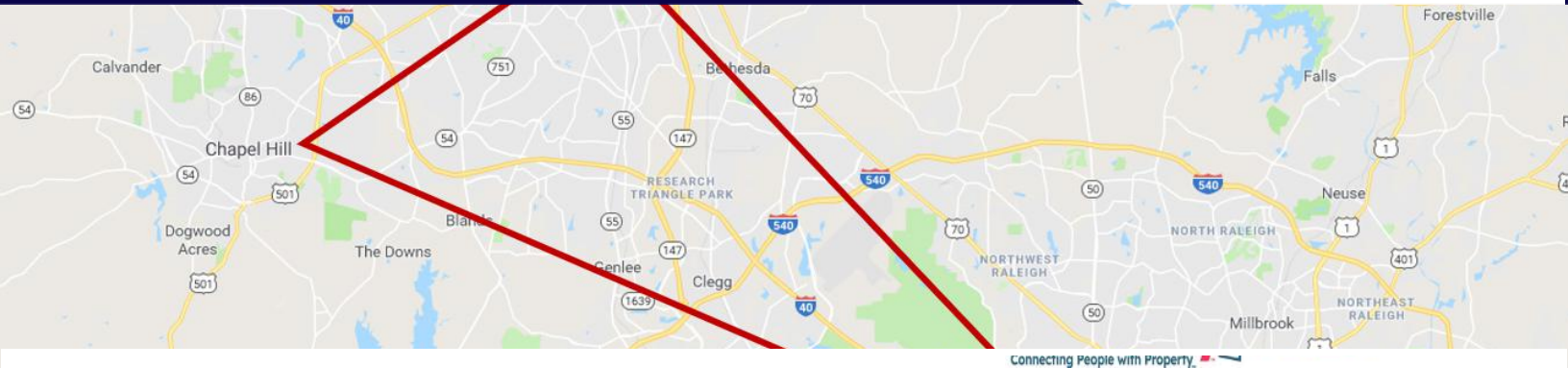
CHATHAM



N. TRIANGLE

MARKET REPORT

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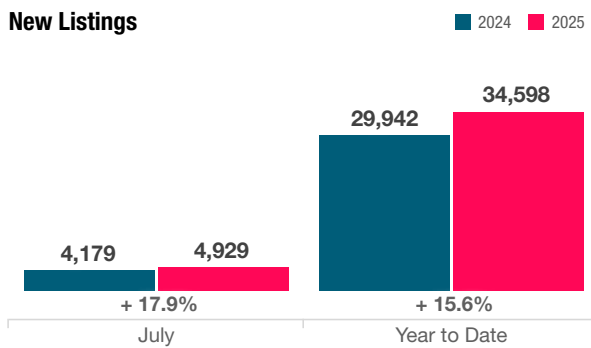


Entire Doorify MLS Region

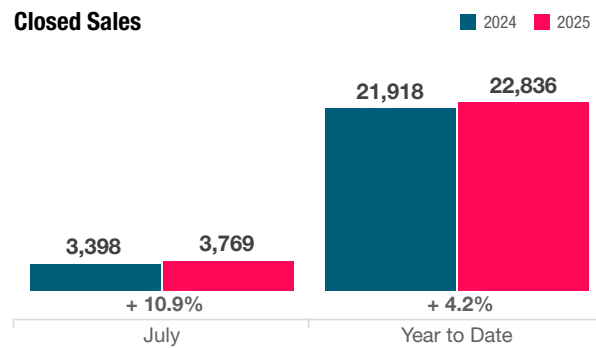
Key Metrics	July			Year to Date		
	2024	2025	% Change	Thru 7-2024	Thru 7-2025	% Change
New Listings	4,179	4,929	+ 17.9%	29,942	34,598	+ 15.6%
Closed Sales	3,398	3,769	+ 10.9%	21,918	22,836	+ 4.2%
Median Sales Price*	\$407,925	\$407,999	+ 0.0%	\$400,000	\$400,000	0.0%
Average Sales Price*	\$494,860	\$502,010	+ 1.4%	\$484,649	\$485,253	+ 0.1%
Total Dollar Volume (in millions)*	\$1,682	\$1,891	+ 12.4%	\$10,621	\$11,078	+ 4.3%
Percent of Original List Price Received*	98.0%	96.7%	- 1.3%	98.4%	97.0%	- 1.4%
Percent of List Price Received*	99.2%	98.6%	- 0.6%	99.5%	98.8%	- 0.7%
Days on Market Until Sale	18	24	+ 33.3%	19	25	+ 31.6%
Housing Affordability Index	78	79	+ 1.3%	80	80	0.0%
Inventory of Homes for Sale	8,239	11,576	+ 40.5%	—	—	—
Months Supply of Homes for Sale	2.8	3.6	+ 28.6%	—	—	—

* Does not account for sale concessions and/or downpayment assistance. | Percent changes are calculated using rounded figures and can sometimes look extreme due to small sample size.

New Listings

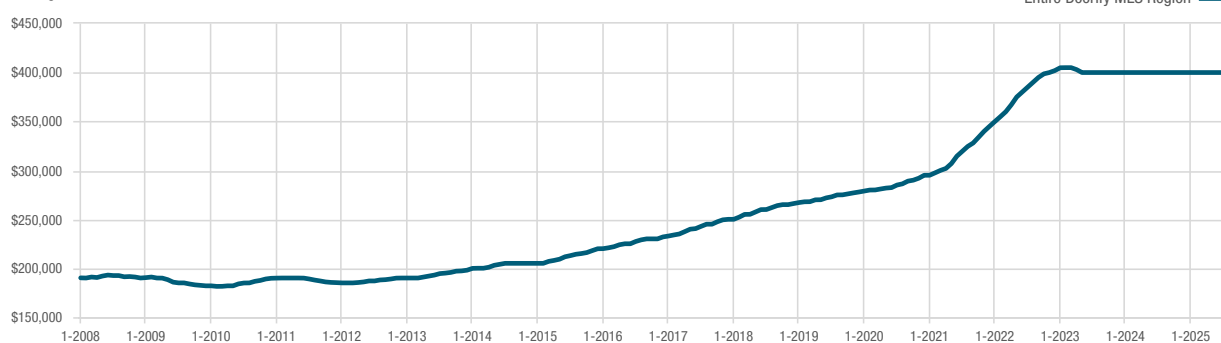


Closed Sales



Median Sales Price

Rolling 12-Month Calculation



A rolling 12-month calculation represents the current month and the 11 months prior in a single data point. If no activity occurred during a month, the line extends to the next available data point.

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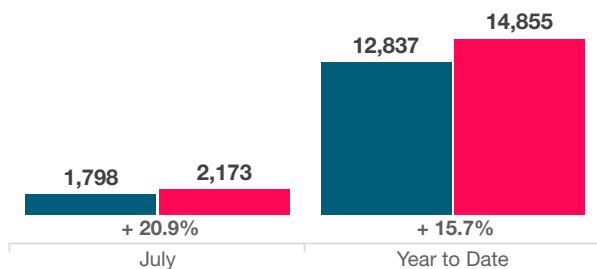
Wake County

Key Metrics	July			Year to Date		
	2024	2025	% Change	Thru 7-2024	Thru 7-2025	% Change
New Listings	1,798	2,173	+ 20.9%	12,837	14,855	+ 15.7%
Closed Sales	1,413	1,677	+ 18.7%	9,501	9,743	+ 2.5%
Median Sales Price*	\$490,000	\$490,000	0.0%	\$480,000	\$480,000	0.0%
Average Sales Price*	\$602,281	\$594,850	- 1.2%	\$580,914	\$577,700	- 0.6%
Total Dollar Volume (in millions)*	\$851	\$997	+ 17.2%	\$5,519	\$5,628	+ 2.0%
Percent of Original List Price Received*	98.5%	96.9%	- 1.6%	98.9%	97.4%	- 1.5%
Percent of List Price Received*	99.5%	98.7%	- 0.8%	99.8%	99.0%	- 0.8%
Days on Market Until Sale	17	22	+ 29.4%	17	23	+ 35.3%
Housing Affordability Index	92	92	0.0%	94	94	0.0%
Inventory of Homes for Sale	3,109	4,569	+ 47.0%	—	—	—
Months Supply of Homes for Sale	2.4	3.4	+ 41.7%	—	—	—

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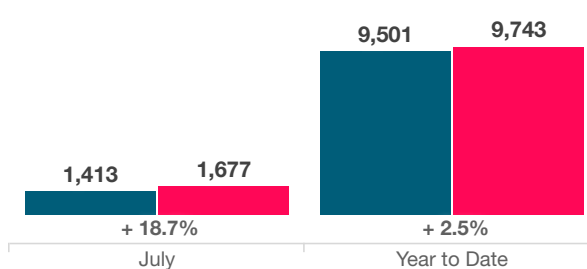
New Listings

■ 2024 ■ 2025



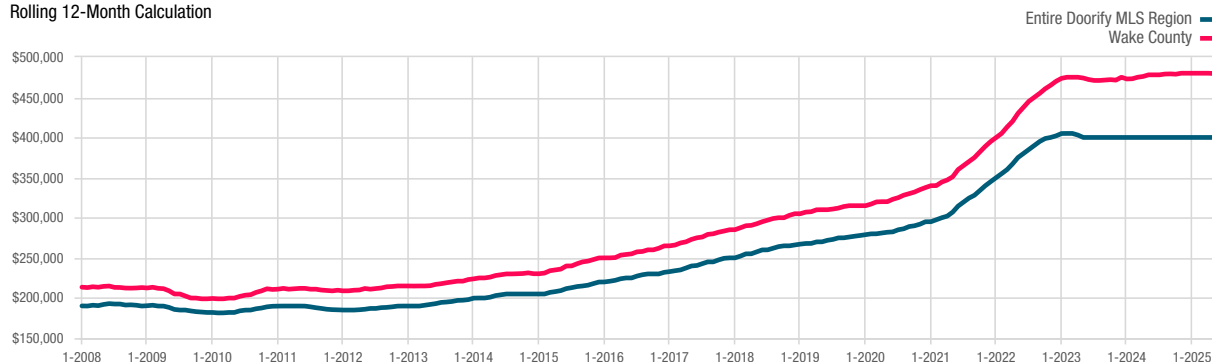
Closed Sales

■ 2024 ■ 2025



Median Sales Price

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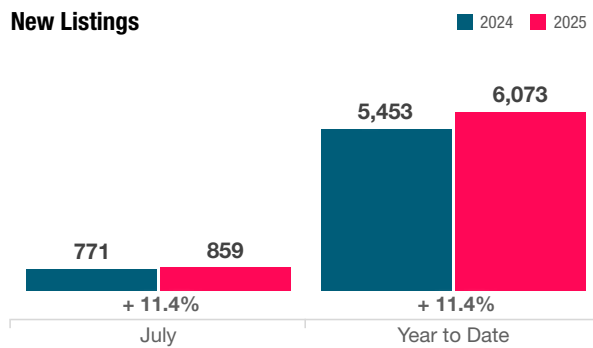
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Raleigh

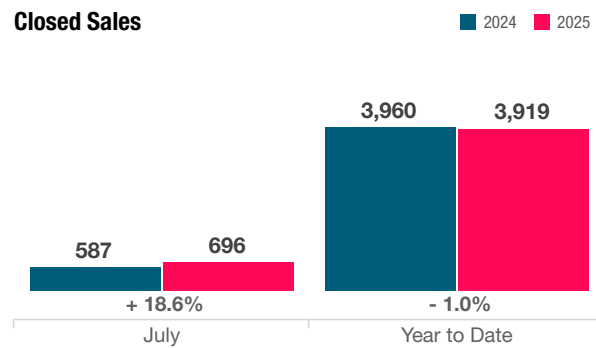
Key Metrics	July			Year to Date		
	2024	2025	% Change	Thru 7-2024	Thru 7-2025	% Change
New Listings	771	859	+ 11.4%	5,453	6,073	+ 11.4%
Closed Sales	587	696	+ 18.6%	3,960	3,919	- 1.0%
Median Sales Price*	\$456,000	\$470,000	+ 3.1%	\$440,638	\$457,590	+ 3.8%
Average Sales Price*	\$632,443	\$606,999	- 4.0%	\$581,518	\$595,665	+ 2.4%
Total Dollar Volume (in millions)*	\$371	\$422	+ 13.7%	\$2,303	\$2,334	+ 1.3%
Percent of Original List Price Received*	98.0%	96.5%	- 1.5%	98.4%	97.1%	- 1.3%
Percent of List Price Received*	99.4%	98.4%	- 1.0%	99.5%	98.8%	- 0.7%
Days on Market Until Sale	21	25	+ 19.0%	21	29	+ 38.1%
Housing Affordability Index	92	89	- 3.3%	95	92	- 3.2%
Inventory of Homes for Sale	1,428	1,943	+ 36.1%	—	—	—
Months Supply of Homes for Sale	2.7	3.6	+ 33.3%	—	—	—

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New Listings

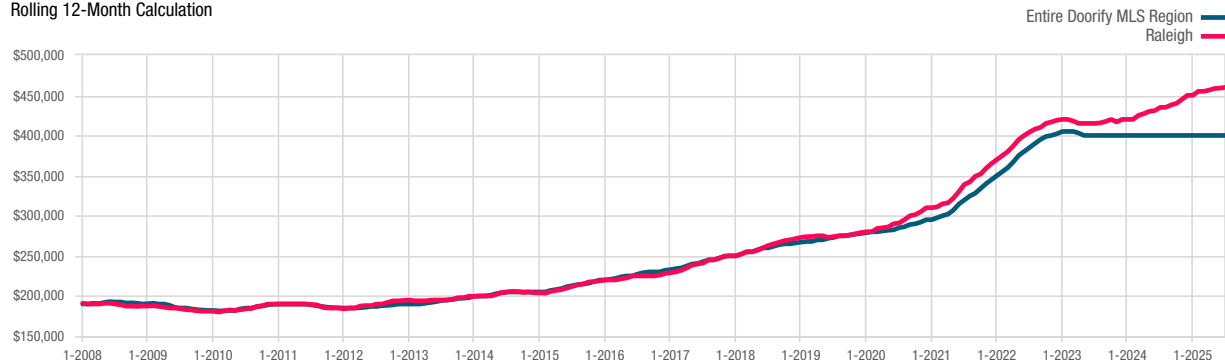


Closed Sales



Median Sales Price

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MARKET REPORT

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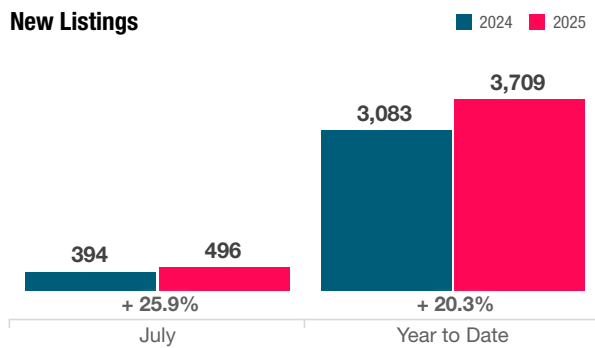
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Durham County

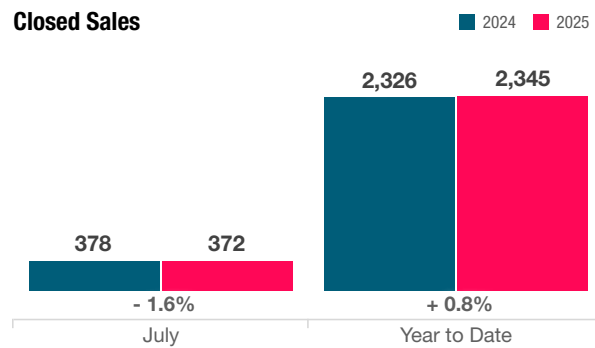
Key Metrics	July			Year to Date		
	2024	2025	% Change	Thru 7-2024	Thru 7-2025	% Change
New Listings	394	496	+ 25.9%	3,083	3,709	+ 20.3%
Closed Sales	378	372	- 1.6%	2,326	2,345	+ 0.8%
Median Sales Price*	\$445,450	\$435,000	- 2.3%	\$425,000	\$428,747	+ 0.9%
Average Sales Price*	\$489,672	\$512,578	+ 4.7%	\$470,490	\$487,551	+ 3.6%
Total Dollar Volume (in millions)*	\$185	\$191	+ 3.2%	\$1,094	\$1,143	+ 4.5%
Percent of Original List Price Received*	98.8%	96.9%	- 1.9%	99.1%	97.4%	- 1.7%
Percent of List Price Received*	99.9%	98.9%	- 1.0%	100.1%	99.0%	- 1.1%
Days on Market Until Sale	16	28	+ 75.0%	19	27	+ 42.1%
Housing Affordability Index	80	82	+ 2.5%	84	83	- 1.2%
Inventory of Homes for Sale	682	1,114	+ 63.3%	—	—	—
Months Supply of Homes for Sale	2.2	3.4	+ 54.5%	—	—	—

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New Listings

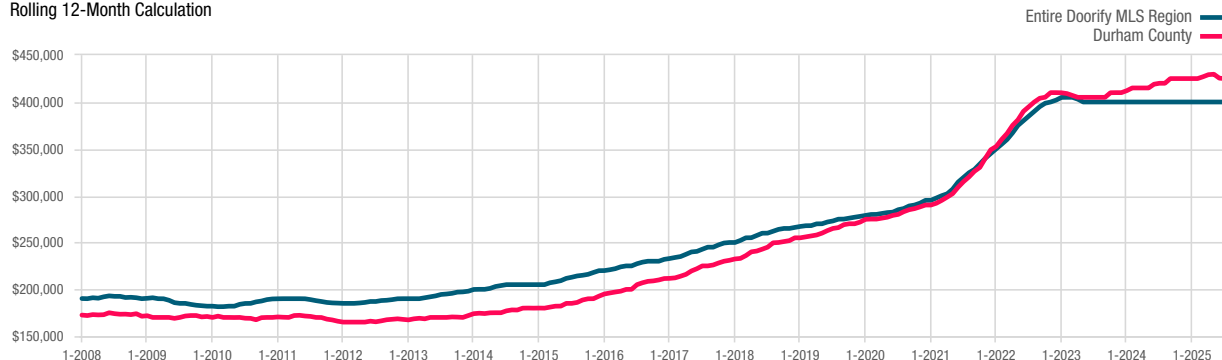


Closed Sales




Median Sales Price

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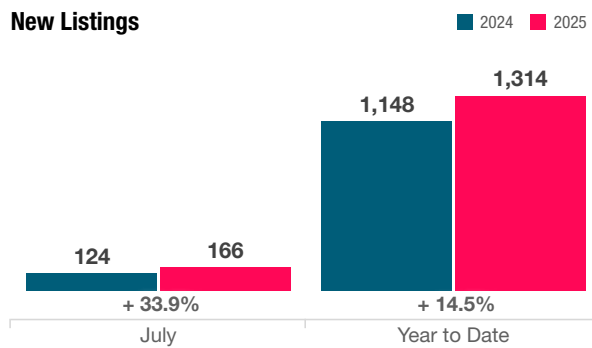
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Orange County

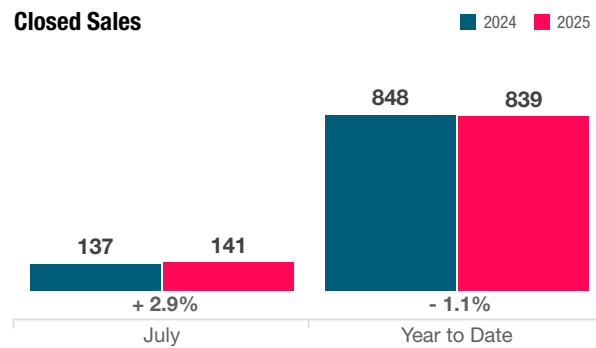
Key Metrics	July			Year to Date		
	2024	2025	% Change	Thru 7-2024	Thru 7-2025	% Change
New Listings	124	166	+ 33.9%	1,148	1,314	+ 14.5%
Closed Sales	137	141	+ 2.9%	848	839	- 1.1%
Median Sales Price*	\$510,000	\$478,922	- 6.1%	\$500,000	\$500,000	0.0%
Average Sales Price*	\$615,847	\$626,376	+ 1.7%	\$624,850	\$627,646	+ 0.4%
Total Dollar Volume (in millions)*	\$84	\$88	+ 4.8%	\$528	\$527	- 0.2%
Percent of Original List Price Received*	98.7%	96.8%	- 1.9%	99.6%	98.4%	- 1.2%
Percent of List Price Received*	100.0%	99.1%	- 0.9%	100.7%	99.9%	- 0.8%
Days on Market Until Sale	18	30	+ 66.7%	19	28	+ 47.4%
Housing Affordability Index	89	95	+ 6.7%	91	91	0.0%
Inventory of Homes for Sale	270	403	+ 49.3%	—	—	—
Months Supply of Homes for Sale	2.4	3.6	+ 50.0%	—	—	—

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New Listings

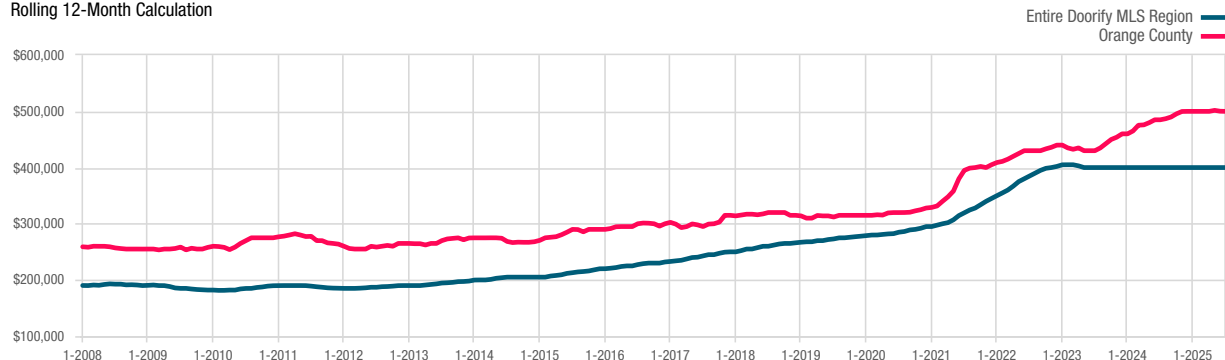


Closed Sales



Median Sales Price

Rolling 12-Month Calculation



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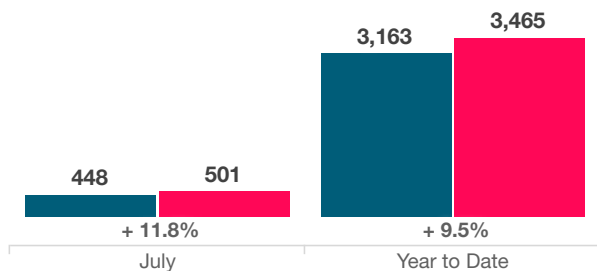
Johnston County

Key Metrics	July			Year to Date		
	2024	2025	% Change	Thru 7-2024	Thru 7-2025	% Change
New Listings	448	501	+ 11.8%	3,163	3,465	+ 9.5%
Closed Sales	379	367	- 3.2%	2,413	2,396	- 0.7%
Median Sales Price*	\$347,000	\$350,000	+ 0.9%	\$357,000	\$354,900	- 0.6%
Average Sales Price*	\$372,747	\$383,216	+ 2.8%	\$378,001	\$382,010	+ 1.1%
Total Dollar Volume (in millions)*	\$141	\$140	- 0.7%	\$912	\$915	+ 0.3%
Percent of Original List Price Received*	98.0%	96.5%	- 1.5%	97.9%	97.1%	- 0.8%
Percent of List Price Received*	99.3%	98.6%	- 0.7%	99.2%	98.8%	- 0.4%
Days on Market Until Sale	18	23	+ 27.8%	19	20	+ 5.3%
Housing Affordability Index	100	99	- 1.0%	97	98	+ 1.0%
Inventory of Homes for Sale	989	1,327	+ 34.2%	—	—	—
Months Supply of Homes for Sale	3.0	3.9	+ 30.0%	—	—	—

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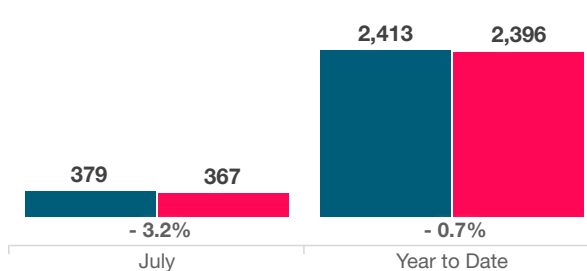
New Listings

■ 2024 ■ 2025



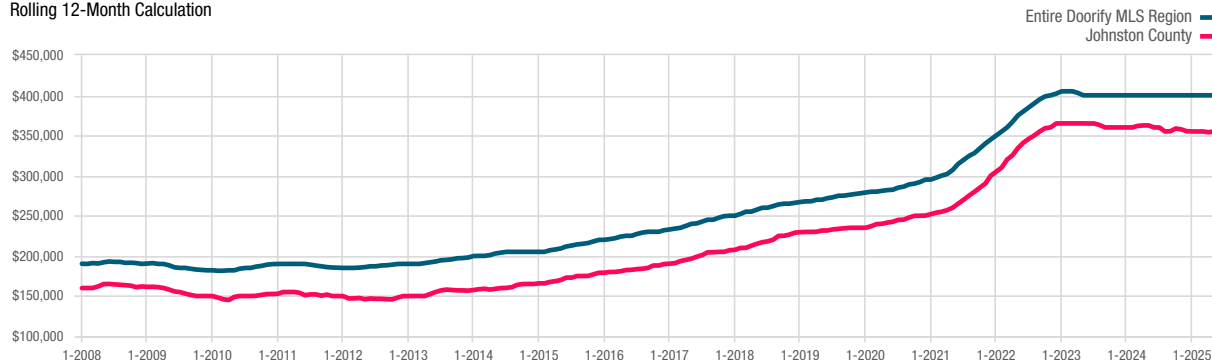
Closed Sales

■ 2024 ■ 2025



Median Sales Price

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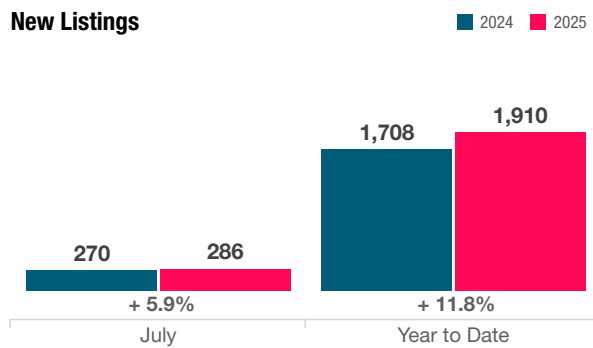
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Harnett County

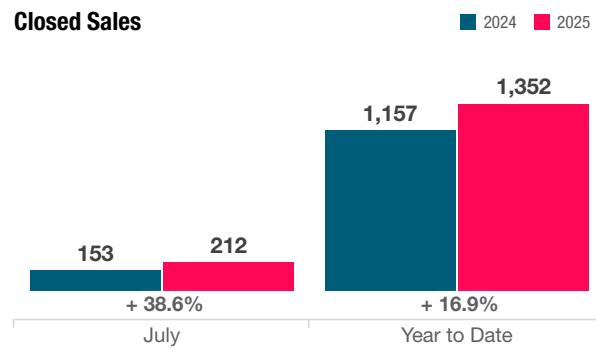
Key Metrics	July			Year to Date		
	2024	2025	% Change	Thru 7-2024	Thru 7-2025	% Change
New Listings	270	286	+ 5.9%	1,708	1,910	+ 11.8%
Closed Sales	153	212	+ 38.6%	1,157	1,352	+ 16.9%
Median Sales Price*	\$349,900	\$339,992	- 2.8%	\$333,615	\$335,000	+ 0.4%
Average Sales Price*	\$371,897	\$357,011	- 4.0%	\$347,941	\$353,385	+ 1.6%
Total Dollar Volume (in millions)*	\$57	\$76	+ 33.3%	\$403	\$478	+ 18.6%
Percent of Original List Price Received*	98.1%	96.3%	- 1.8%	98.0%	96.4%	- 1.6%
Percent of List Price Received*	99.3%	98.7%	- 0.6%	99.1%	98.8%	- 0.3%
Days on Market Until Sale	11	25	+ 127.3%	16	19	+ 18.8%
Housing Affordability Index	83	85	+ 2.4%	87	87	0.0%
Inventory of Homes for Sale	655	803	+ 22.6%	—	—	—
Months Supply of Homes for Sale	4.2	4.2	0.0%	—	—	—

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New Listings

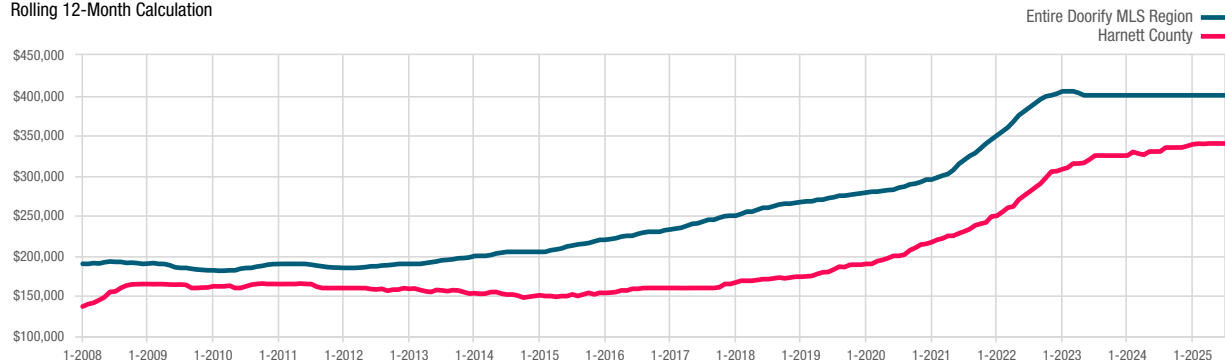


Closed Sales



Median Sales Price

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MARKET REPORT

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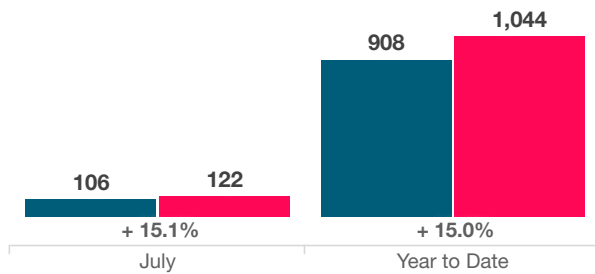
Chatham County

Key Metrics	July			Year to Date		
	2024	2025	% Change	Thru 7-2024	Thru 7-2025	% Change
New Listings	106	122	+ 15.1%	908	1,044	+ 15.0%
Closed Sales	113	105	- 7.1%	690	644	- 6.7%
Median Sales Price*	\$655,000	\$679,910	+ 3.8%	\$641,750	\$674,000	+ 5.0%
Average Sales Price*	\$703,869	\$826,250	+ 17.4%	\$727,968	\$781,475	+ 7.4%
Total Dollar Volume (in millions)*	\$80	\$87	+ 8.8%	\$502	\$503	+ 0.2%
Percent of Original List Price Received*	98.3%	97.2%	- 1.1%	98.5%	97.1%	- 1.4%
Percent of List Price Received*	99.0%	98.7%	- 0.3%	99.3%	98.7%	- 0.6%
Days on Market Until Sale	23	26	+ 13.0%	25	34	+ 36.0%
Housing Affordability Index	59	57	- 3.4%	60	58	- 3.3%
Inventory of Homes for Sale	268	363	+ 35.4%	—	—	—
Months Supply of Homes for Sale	2.9	4.1	+ 41.4%	—	—	—

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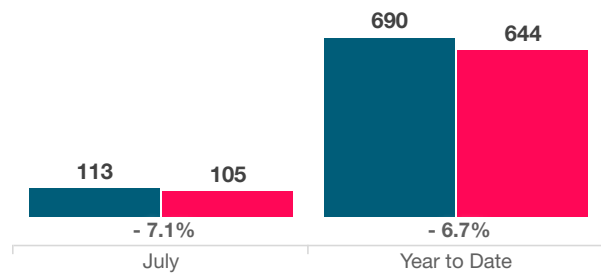
New Listings

■ 2024 ■ 2025



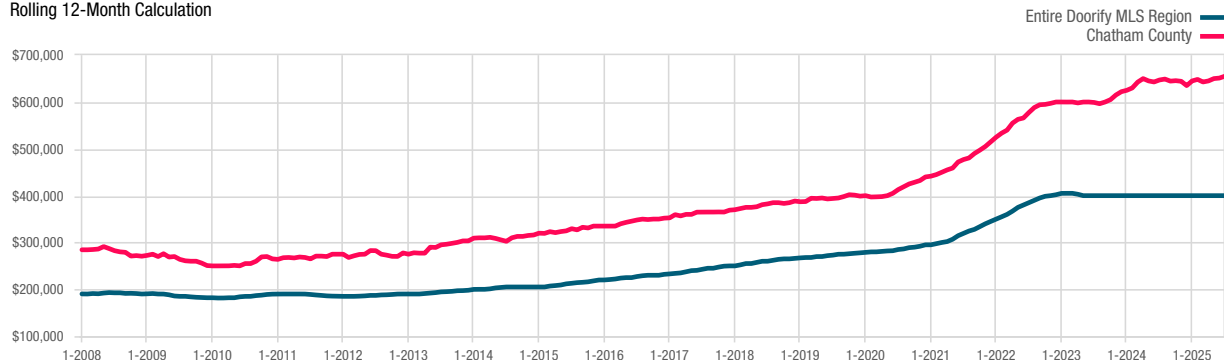
Closed Sales

■ 2024 ■ 2025



Median Sales Price

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Northern Doorify MLS Counties

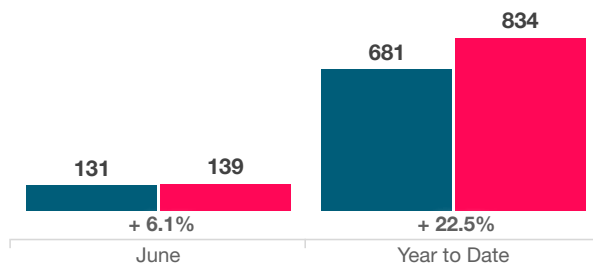
Includes Granville, Franklin, Kerr Lake, Nash, Vance, and Warren Counties.

Key Metrics	June			Year to Date		
	2024	2025	% Change	Thru 6-2024	Thru 6-2025	% Change
New Listings	131	139	+ 6.1%	681	834	+ 22.5%
Closed Sales	69	77	+ 11.6%	442	496	+ 12.2%
Median Sales Price*	\$285,000	\$298,000	+ 4.6%	\$285,000	\$279,995	- 1.8%
Average Sales Price*	\$309,993	\$295,032	- 4.8%	\$289,130	\$287,616	- 0.5%
Total Dollar Volume (in millions)*	\$21	\$23	+ 9.5%	\$128	\$143	+ 11.7%
Percent of Original List Price Received*	95.4%	95.9%	+ 0.5%	96.3%	94.8%	- 1.6%
Percent of List Price Received*	97.8%	98.0%	+ 0.2%	98.4%	97.6%	- 0.8%
Days on Market Until Sale	36	24	- 33.3%	28	31	+ 10.7%
Housing Affordability Index	85	82	- 3.5%	85	88	+ 3.5%
Inventory of Homes for Sale	276	397	+ 43.8%	—	—	—
Months Supply of Homes for Sale	3.5	4.7	+ 34.3%	—	—	—

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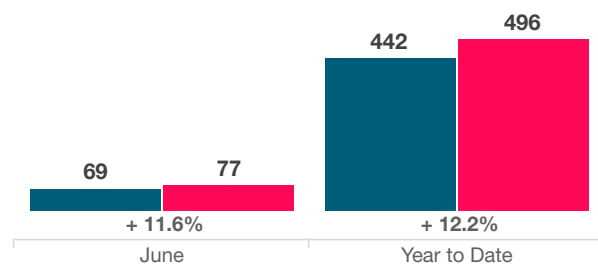
New Listings

■ 2024 ■ 2025



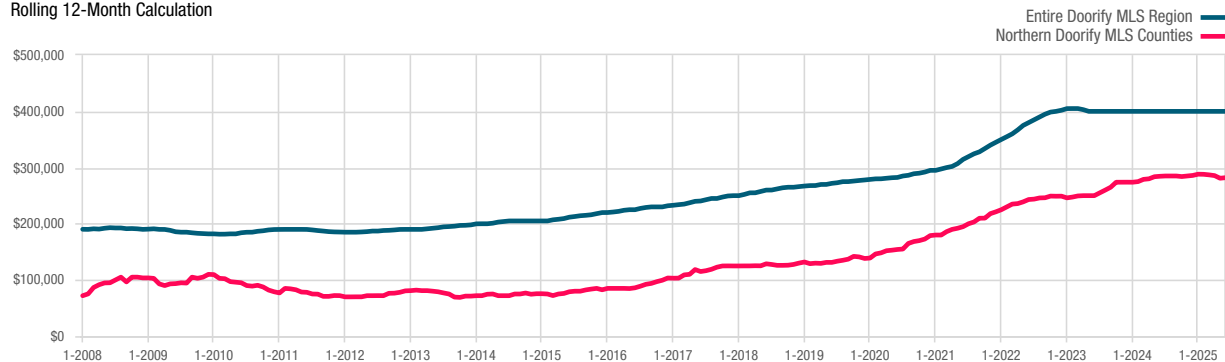
Closed Sales

■ 2024 ■ 2025



Median Sales Price

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We'd love to hear from you.

919.601.7710 | hello@martihampton.com



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